

Sounding Out:

A Rapid Analysis of Young People & Radio in the UK

A Report for the British Council

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About this paper

The British Council commissioned University of Westminster/ MusicTank to provide insight into UK-wide radio, with a particular emphasis on youth-run and youth-curated content and audiences.

The analysis of the research identifies key trends in recent years, and seeks to explain the interconnected networks that operate through various tiers of the radio and audio industry.

The aim is to uncover further understanding of the ecosystems, including key people, technologies and value chains, in order to support long-term planning and programming by the British Council in Southern Africa and the UK.

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Executive Summary

The research resulted in a range of findings, which are summarised below.

The context for these is a changing landscape for the radio and audio industry, and the evolution in the way young people engage with the output, and the opportunities that are presented for participation and production.

Twenty years ago, radio was characterised by narrow definitions dependent on [AM/FM analogue](#) output, and restricted access to the means of production, as determined by institutions such as the BBC and the commercial sector. Since then, there has been a revolution in sound, a process that has revitalised the sector and removed the traditional barriers to entry. These are the significant outcomes of this process, which is demonstrated by the research.

Radio listening is fragmenting in an era of more devices, platforms and choice. The definition of what constitutes 'radio' is also shifting, to include audio and other digital artefacts.

New technologies and devices are changing listening habits and will continue to do so. For instance, the impact of voice activated speakers is beginning to be registered.

Previously recognised 'tribes' and groups of listeners are changing, along with their listening habits, particularly for the younger age range. Stations that rely on young audiences for 'linear', live listening are offering more content on different platforms (such as social media, listen again and podcasts), in the hope of replenishing their listeners.

Concurrent to this is the emergence of small, independent, [hyperlocal](#) stations, many of them broadcasting online, so not tied to regulated licences. These stations have developed different business models and methods of grassroots engagement.

The majority of people working in the traditional radio industry come with degrees, post-graduate and vocational qualifications. The new generation of hyperlocal stations offer more diverse routes into production.

There is evidence that there is much less opportunity for specialism at school and college level; audio skills teaching is now integrated across broader digital and media disciplines.

There are opportunities offered for short course training through industry-sponsored schemes, e.g. the academies run by the BBC, Bauer and Global.

Young peoples' career end goals tend to drive a polarity in experience. Those seeking a route into music presentation and production with the BBC or commercial radio are often found in the student radio environment at universities and colleges. Those interested in creating a portfolio of audio opportunities with a diverse range of output (speech, drama, journalism, podcasts) tend to find experience in community radio, online stations and digital content platforms.

Funding opportunities to finance working with young people are increasingly limited as grants and subsidies have been eroded. Working with brands, through sponsorship and partnership, seems to be replacing these revenue streams (see the [RADAR/ Nike case study](#), p19 for an example of how this shapes content). As the RADAR experience demonstrates, the young audience is resistant to blatant advertising and product placement.

The [four case studies](#) illustrate a range of different models that have emerged. There are various divergent approaches to delivering audio and radio, from the small, hyperlocal stations, to platforms that showcase a variety of digital content. These operations demonstrate engagement with their audience, and training with young people, with a range of needs and abilities. It is also noteworthy that the radio/ audio content embraces speech as well as music, and at the centre of it, there is a passion for telling stories and reflecting human experience.

There is no clear benchmark for a sustainable business model among the case studies, but a trajectory can be mapped for the job opportunities and roles young people can move towards through participation.

Above all, these case studies demonstrate that young people have the tools at their disposal to tell their stories and broadcast them: the former entry barriers into the radio/ audio world have come down.

Key Findings

1. Young people are listening to less live radio each week than their peers, a trend that shows no sign of changing;
2. Live radio is still the preferred method, over 'listen again';
3. Smartphones account for 30% of audio listening for young people, but data charges and restrictions make listening to live radio unattractive;
4. The trend towards 'lean forward', modular listening (e.g. podcasts) is significant in terms of share of audience, though not necessarily the amount of time spent each week;
5. Ownership of voice-activated devices is beginning to have an impact on radio listening;
6. Traditional radio institutions are aware of the challenges they face in encouraging young people to listen to the radio in the same way previous generations did;
7. Competition for young listeners' time and attention, in terms of social media and digital entertainment, is one focus;
8. The change in consumption habits can be defined by new characteristics for key groups of listeners, whose choice of listening reflects a wide and diverse range of influences;
9. There is an emerging strand of hyperlocal, small stations (and digital platforms) which are increasingly tapping into this kind of audience, such as RADAR, NTS and Rinse;
10. Routes into radio and audio production continue to diversify;
11. Teaching audio skills as part of general media production has superseded traditional radio production in many schools and colleges;
12. Universities still offer a route based on participating in traditional format radio stations, though this doesn't always offer equal opportunity in terms of geography, gender, ethnicity and (dis)ability;

13. Small, local stations based in communities are offering workshops and training opportunities to engage with their listeners and generate new volunteers;
14. Media organisations are also diversifying into skills-based training, harnessing technology to work on different platforms and enable engagement with audio in general.

Context and Methodology

The overall aim of this research is to use the insight to deepen the British Council's understanding of youth-curated and youth-focused radio in the UK, to understand the ecosystem and value chains, how it functions and is accessed, the key players, and existing connections internationally (especially with Southern Africa) in order to support long-term planning and programming by the British Council in Southern Africa and the UK.

The methodology has involved an analysis of data, a range of [interviews](#) and a series of [case studies](#), in order to better understand Current Trends of Radio Consumption ([section 1.1](#)), Young People as the Audience ([sections 1.2](#)), and Education and Training ([section 1.3](#)).

Two important issues emerged initially which require clarification.;

1. The original goal of the proposal brief cited 'digital radio' as the focus for the research. The term 'digital' in the radio context brings with it some ambiguity. It is associated with files of audio stored or shared in digital format. It can also mean the platform for broadcast, which in the UK is based on the [DAB](#) and [DAB+](#) multiplex system. There might also be a connotation with radio as listened to via televisions and online. Hence it was decided to circumvent 'digital' as the means of transmission or reception and focus instead on radio and audio for young people.
2. There was also some refinement of the case studies and interviews, as originally proposed and agreement to choose a spread of organisations that have a range of approaches that reflect the sector and serve as useful role models of participatory engagement for young people.

The key statistical sources are the data from [RAJAR](#) quarterly radio reports into UK listening and the quarterly MIDAS Report, the Measurement of Internet Delivered Services, and [OFCOM](#), who produce an annual Communications Market Report (see [Annex ii – references](#)).

For the avoidance of doubt, this study adopts the Ofcom definition of the term 'Radio', which lists the following platforms/ formats:

Live Radio	Radio (at the time of broadcast), received via a radio receiver or other ways such as via a digital set-top box.
On-Demand Radio	On-demand (e.g. listen again) radio programmes or podcasts.
Personal Digital Audio	Personal digital music or audio collections (e.g. on computer, iPod, smartphone, etc.)
Streamed Music	Streamed online music (e.g. Amazon Music, Apple Music, Google Play, Spotify)
(Live) Internet Radio	Live Internet streaming of content not being broadcast over the air (e.g. Apple Music Beats 1).
Audio	Audio as a whole includes all the categories of listening described above.

1.0 Analysis of Current Industry Data

1.1 Overview of Current Trends in Radio consumption

The overall trend is that radio listening is stable, unlike the relative turbulence in other areas of the digital communications market, such as television and print media.

Figure 1:

Live TV vs. Radio

Nine in ten people listen to radio at least once a week (89.6% of the adult population), which has remained unchanged in five years. (OFCOM p120)

Only watching live television is a more popular media consumption activity. (93%, RAJAR p4)

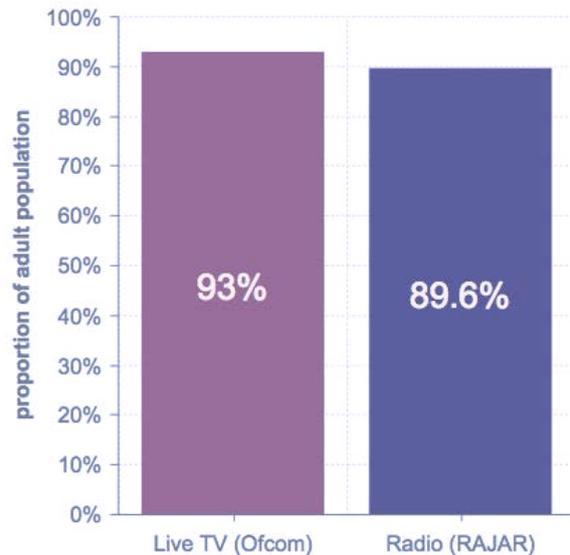


Figure 2:

Live radio listening by genre

63% of live radio listening is to music stations, 38% is to speech stations. (OFCOM p97)

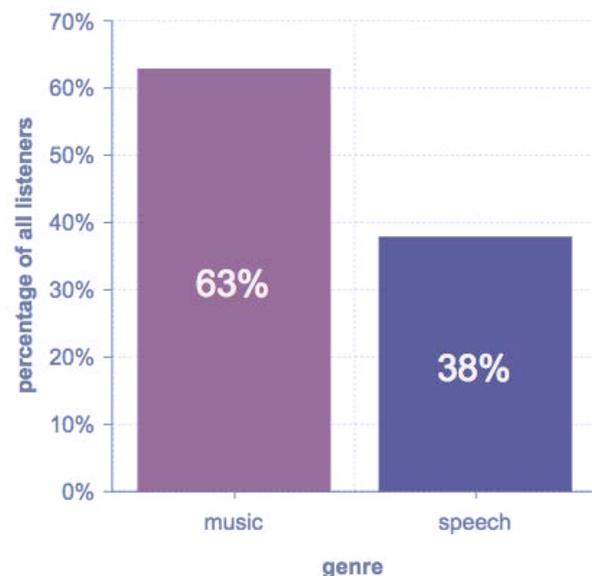


Figure 3:

Proportion of on-demand music listening overall

Listening to on-demand music services accounts for 22% of time overall, 28% for 15-24 year olds.
(RAJAR p5)

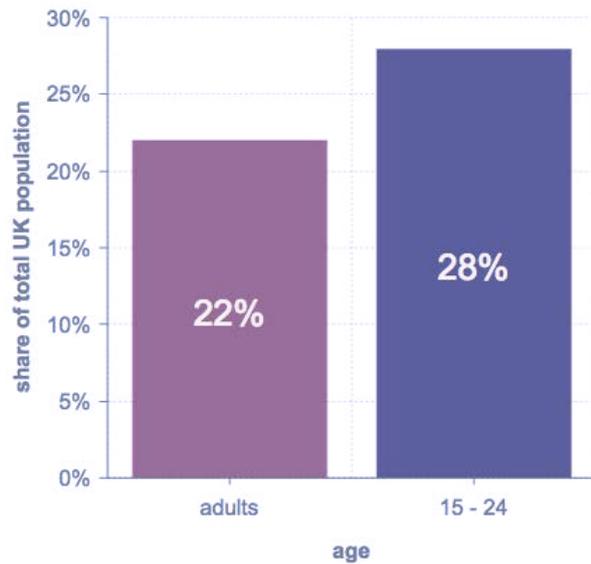


Figure 4:

Proportion of live radio consumption per week

According to RAJAR, 50% of 15-24 year olds listen to live radio each week, and 63% of 25-34 year olds, compared to 88% for 55+.
(RAJAR p5-6)

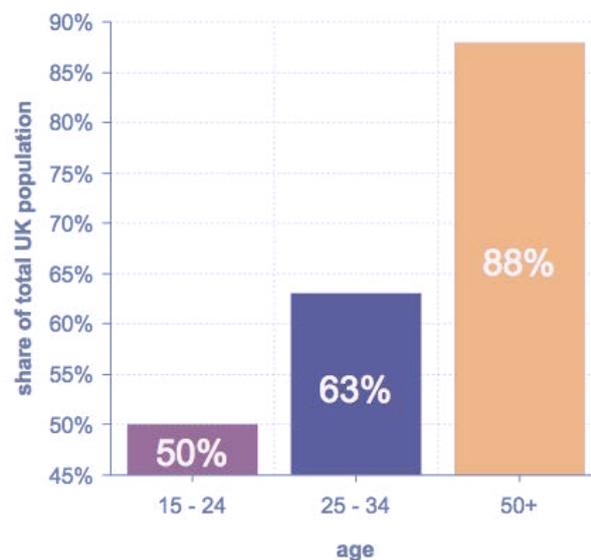


Figure 5: Average listening per week

On average, across all ages, people listen to 22 hours per week of radio. The figure for 15-24 year olds is 14 hours (RAJAR p15-16). Interestingly, live listening to the radio (as in listening to a programme while it's being broadcast) is still the favourite method.

So-called 'listen again' only accounts for 8% of listening for 15-24 year olds. (RAJAR p7)

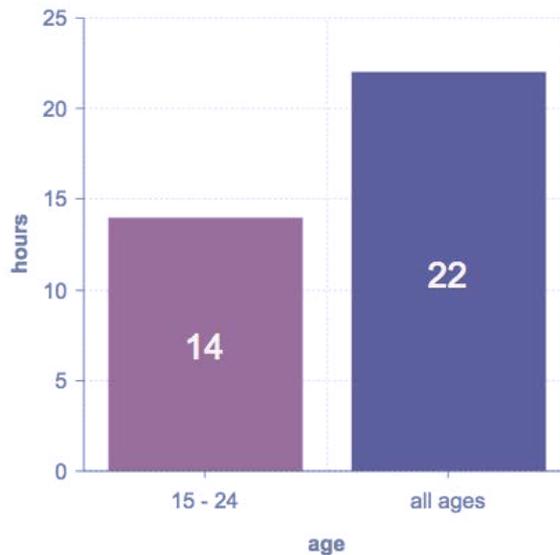
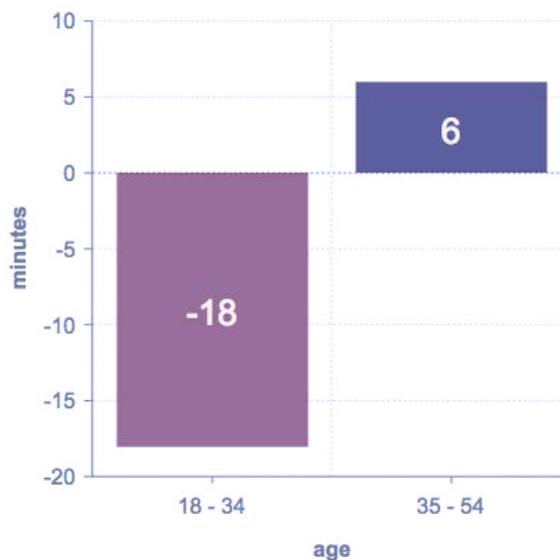


Figure 6:

Change in listening time per week

While the mid age range (34-35) are listening to six minutes *more* of live radio per week, the younger age group (18-34) are listening to 18 minutes *less*, compared to 2016. (OFCOM p122)



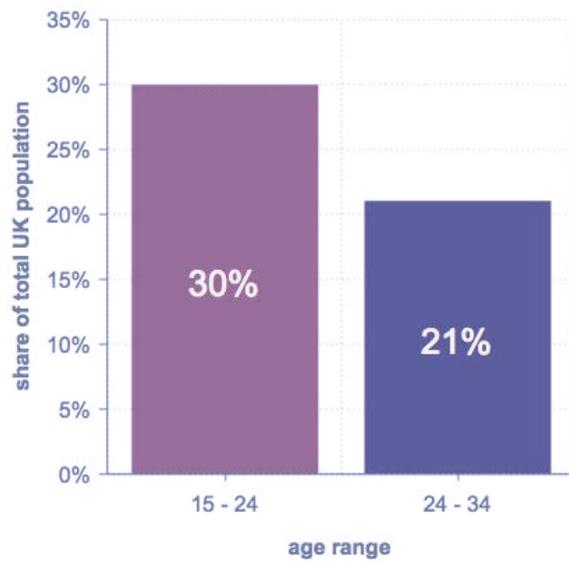
So it is clear that young people are consuming less live radio than their peers, and there's no indication this trend is likely to reverse. However, the unknown factor is whether young people will return to live radio as they get older. Matt Deegan, Creative Director, Folder Media and a leading voice in the sector, believes this is unlikely; as peoples' life patterns shift, there is less time to seek out content and change habits.

Meanwhile, young listeners are accessing speech and music on various connected devices, e.g. tablets and smartphones. This is where the distinctions between radio and streaming services and podcasts start to blur, in terms of established measurement techniques.

Figure 7:

Proportion of audio consumption by smartphone

RAJAR report that for 15-24 year olds, 30% of their audio is accessed on smartphones, and 21% for 25-34 year olds. (RAJAR p8)

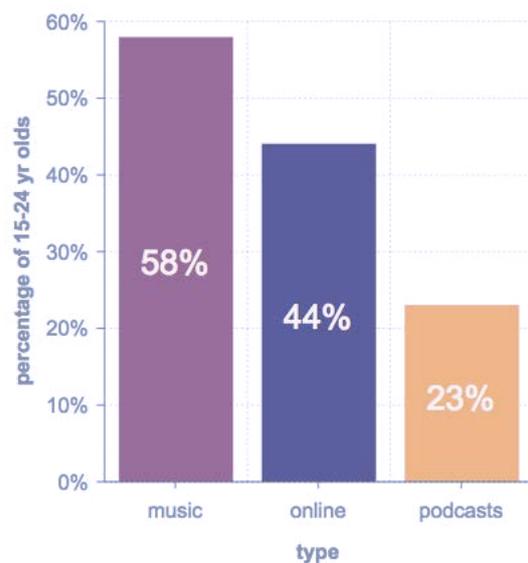


What constitutes ‘audio’ can be broken down using OFCOM findings...

Figure 8:

Proportion of personal device listening by type

These show that 58% of 16-24 year olds say they are using their personal devices to listen to music, 44% use them to listen to online music services, while 23% listen to podcasts. (OFCOM p100)



Whilst there are apps for streaming live radio on mobiles, data consumption is dependent on price plans and data allowances, and can be very expensive (so-called 'bill shock'); listening to live radio via mobiles is less popular. Despite this, over 65% of 15-35 year olds have downloaded radio apps (RAJAR p3).

The use of radio sets is still significant, but again is falling amongst the younger demographic...

Figure 9:

Traditional radio set usage

Of the 25-34 year old age band, 25% listen to radio via AM/ FM, and 25% via DAB. This drops to 19% and 17% respectively for 15-24 year olds. (RAJAR p8)



The point here is that devices are significant. Modular consumption of both audio and video (i.e. in small quantities or packets) is much more apparent, and portable devices enable this. Radio has adapted to these platforms, but it is in competition with other services, in a way that it wasn't in the pre-internet/ pre-digital era.

Matt Deegan argues that audio consumption is a singular experience (i.e. listening alone via headphones), unlike communal activities such as television watching or indeed traditional radio listening, to a receiver in the living room.

Young people often don't have control of the communal device, so a great amount of listening is done whilst travelling, or in bedrooms – it's an individualistic experience.

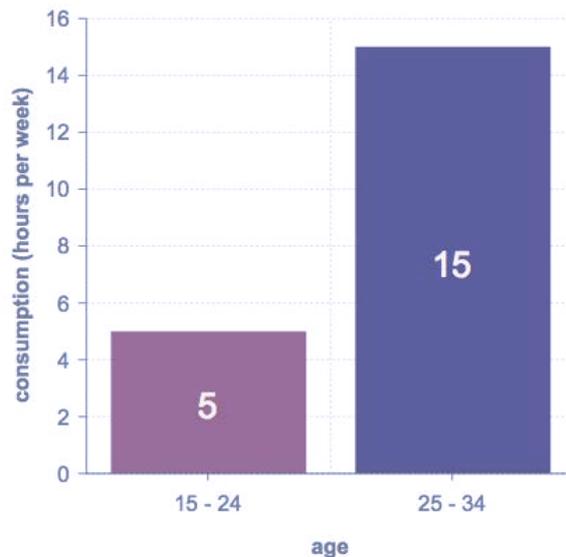
Another way of analysing audio consumption is the difference between 'lean back' and 'lean forward' listening. Listening to live radio (especially music) is characterised as the former, something that plays in the background, an accompaniment to other activities, the classic 'secondary' listening pastime.

The growth in modular audio, e.g. podcasts, is often defined as ‘lean forward’ listening: a more deliberate and focussed approach, where time is set aside for concentration and deliberate consumption, often for shorter time spans.

Figure 10:

Podcast consumption per week

Podcasting accounts for only 2% of the time spent on audio consumption by 15-24 year olds (about 5 hours a week), but 6% for 25-34 year olds (the highest share across all demographics). (RAJAR pp5;16)

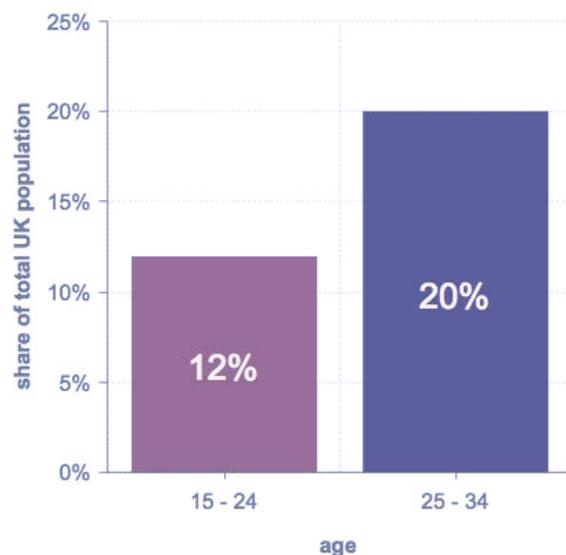


However...

Figure 11:

Podcasting reach

In terms of reach, podcasts are listened to by 12% of 15-24s, and 20% of 25-34 year olds. (RAJAR p7)



This trend for ‘bite-sized’ listening is a potential growth area and fits well with the evolution of personalised listening and the sharing of content. However, one other method of listening is emerging which could further buck current trends – [voice-activated speakers](#)...

Figure 12:

Listening via voice-activated speakers

Ownership of voice activated speakers is beginning to register in audio research (1% of 15-24 year olds, 2% of 25-34 year olds, RAJAR p8 and a projected 40% of all households in 2018. (Getting Vocal p5).



‘Getting Vocal: How voice activated devices are increasing radio listening and elevating audio branding’, a report by the Radio Centre, Global and Radio Player into the use of Amazon Echo devices, discovered that 72% of all entertainment time was spent listening to the radio (p5). This might be accounted for by the number of radio stations that have developed apps and a friendly user interface for their services on voice activated speakers. Ownership of the Echo is particularly high among 25-44 males in London and the south east (p6). It is also interesting to note that the Echo (and presumably similar devices) are used in communal areas of the home, such as the living room, again replicating the idea of shared listening (p8).

1.2 Young People As The Audience

Radio as a medium has always had the ability to adapt and change. In the pre-online and pre-digital world, there was not much in the way of competition for the dominant BBC and commercial stations. Barriers to entry in the industry were high.

The media landscape has since changed beyond recognition, with so many different, competing demands and opportunities for consumption and entertainment.

So what is radio's USP? Almost everyone agrees that radio offers companionship, a human or emotional connection with at least one other person. Streaming services can't offer this yet.

Radio's adaptability in the face of other platforms includes the ability to be broken down into modular elements, and boasts portability and immediacy.

There are **opportunities for personalised content** (perhaps suggested by algorithms, similar to music streaming services), **and virality**, created by social media and other online platforms and connections.

Yet despite this, **young people's consumption of radio, especially live radio, is declining.** Why?

There are a variety of factors. One argument is that **traditional, mainstream stations, such as BBC Radio 1, have not done enough to cater for the breadth and diversity of emerging music tastes. Nor have they focussed on the younger end of their core demographic.**

These teens have sought other sources of information and entertainment, often around issues that are closer to their communities. These might be vloggers on You Tube, Instagram or other platforms. So the competition for Radio 1's audience comes not from other stations, but from entertainment and media in general, hence its current strategy to put digital content first, and position itself as 'the Netflix of radio'.

As this young audience is getting older, this shift in consumption and behaviour runs contrary to the listening habits of previous generations. BBC 6 Music has identified three groups of listeners:

- Eclectic Seekers (20–34 years)
- Indie/ Disco (30–40 years)
- Mature Music Lovers (40–55 years)

Their challenge is to nurture the Eclectic Seekers into loyal listeners. However, as the name suggests, Eclectic Seekers have open and diverse tastes: they enjoy a variety of musical genres, often outside the mainstream. They are adaptors to new and different technologies, using a range of platforms for inspiration and knowledge. They are 'bold, ahead of the curve, possessing a personal sense of style': they work hard, play hard and behave as though their lives are in flux (6Music/ BBC p4).

It is this audience that is also discovering other radio stations to fill the gap left by mainstream media.

This gap is being filled by an emerging generation of small, hyperlocal stations, generally broadcasting online. Examples include RADAR Radio, NTS, Rezzent and Rinse in London and Reform Radio in Manchester.

RADAR Radio and NTS provide useful points of comparison. Both have emerged in the last six or seven years, based around specific music genres (RADAR is grime, NTS is more electronic, house and techno).

Both stations prefer to broadcast online and not apply for an FM licence (though NTS did pay for a slot on DAB but came off recently because there was limited return).

Being online means being able to broadcast without restriction: "To represent a young audience, you need to be able to say and play what you want" (Ben Fairclough, Station Manager, RADAR Radio).

The content is driven by a variety of volunteer DJs and presenters, showcasing their favourite music. RADAR adopts a traditional radio schedule format, with a breakfast show and daytime programmes. NTS has a more eclectic mix, given that it has studios in New York, Los Angeles, Shanghai and Manchester.

RADAR has also recruited presenters who have a high social media profile, in order to capitalise on their following and fans, hopefully translating these into listeners. For example, the breakfast show is presented by Shy, who is a model, a DJ and an Instagrammer. She also works for BBC 1Xtra and MTV. Another presenter, Aliyah Maria Bee, comes with 800,000 You Tube subscribers.

NTS has 600 DJs from 52 cities across the world – they receive around 2,000 emails a week, many from people wanting to do shows.

The business models are also different. NTS began with a grant from the Prince's Trust; RADAR from private investment raised by the founder. **Advertising on air is eschewed in favour of brand partnerships.** NTS work with Bang & Olufson, Adidas, Carhartt and Sonos. RADAR have deals with Nike, Puma and Red Bull.

The brands sponsor shows, or the stations work with them at events, e.g. the Mixcloud Festival.

One example has been the Nike *London's Fastest* campaign, which featured RADAR putting on in-store DJ sets and radio broadcasts. The campaign included a 5K running event, with challenges and team games, hosted by DJ Shy. RADAR provided a training playlist each week, Nike provided a pair of trainers, and together, each participant had a story that came out of the experience.

“Potentially radio is still such an important medium for young people as it can create a narrative where certain other platforms can’t. And why RADAR can, [is] because it can create a different story with the characters that we involve” (Ben Fairclough, Station Manager, RADAR Radio).

Both NTS and RADAR also run live events and sell station merchandise, though these activities contribute more to brand awareness than income.

When it comes to measuring the audience, there is ambivalence about the exact statistics, as online listening can be hard to quantify. The core audiences seem to be young (20 yr olds +, NTS is slightly older). There’s a male bias, and more ethnic diversity for RADAR than NTS, which is more white.

Matt Deegan argues that audiences for online stations are really very small, but for various reasons this is kept quiet, commenting that “If their volunteers knew that no one listens, the whole thing would fall apart”.

NTS, RADAR and others prove that there is an appetite to produce content, which reaches and satisfies a diverse audience, who want to consume and get involved. It also attracts big corporate brands to help pay for them. Yet is it still radio? And is the linear radio model the best one to follow?

“It’s a conversation we’re constantly having: are we a radio station or a streaming service?” (Femi Adeyemi, CEO NTS). Indeed, NTS uses several different identities, as NTS Radio, and NTS Live.

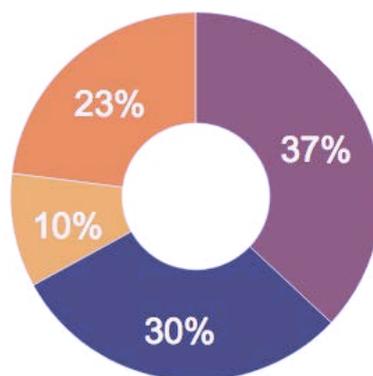
RADAR acknowledge that much of their audience engage solely with the video content, rather than the audio. Clips from Shy’s breakfast show are uploaded to YouTube, and these get the largest numbers of hits. When it comes to listening, the audience seem to prefer short form and clips. But brands favour the cachet of sponsoring a radio station. It commands more kudos than a podcast name.

1.3 Education and Training Opportunities

Routes into the radio/ audio industries are diverse, and are continuing to evolve.

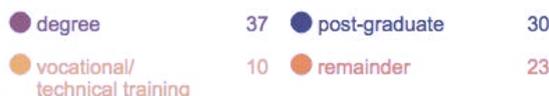
Figure 13: Employment

According to [Creative Skillset](#), over 17,000 people are currently employed in the radio industry. Of these, 37% have a degree, 30% have a post-graduate degree and 10% have a vocational or technical qualification.



[‘remainder’ being school leavers with no specialist qualification]

The range of degree subjects studied includes Culture/ English Literature (14%); History (10%); Communications/ Media (9%); Science (8%) and Performing Arts (5%).



Six degree courses hold Skillset Accreditation for their Radio Production courses (five undergraduate and one postgraduate, covering London, Birmingham, Sunderland and Scotland).

A search of UCAS (the University and Colleges Admissions Service), using the generic term ‘radio’ generates 167 returns, with courses that include some element of radio or audio production. The majority are joint honours (combined with other subjects) or pathways of wider media production degrees.

Once at university, many students encounter radio through their college station. Forty-six are registered as members of the Student Radio Association (SRA), who support them with a range of events (e.g. the annual Student Radio Awards and Conference). The SRA is run by five volunteer executives, with eight regional officers across England, Wales and Scotland (none currently in Northern Ireland).

Those actively involved in student radio with a career in view usually have one of two goals: to be a presenter or a producer, working for either the BBC (especially Radio One) or one of the major commercial stations (e.g. Capital, Kiss, Heart). The SRA sees part of its remit to broaden these perceptions and raise the profile of other related careers, e.g. station imaging/ branding, event management, social media.

However, the structure and schedules of most student stations tends to mirror the current formats of BBC and commercial radio output, perhaps reinforcing the traditional routes.

Lack of diversity extends into other areas of the Student Radio sector. Only one member of the current SRA executive is female, and inclusion for [BAME](#) and people with disabilities is not currently monitored.

But the perception is one of predominantly white and male dominance. There is also a London and southern bias in terms of visibility and activity, which stations in the north have commented on.

There have been initiatives to alter this, such as a women-only DJ workshop at the Student Radio Conference in 2016.

Some student stations transmit as part of an OFCOM community licence (e.g. in Luton, Sunderland, Lincoln, Canterbury) and part of the remit will be to reflect the diversity of their audience, both on air and in station operation.

Despite this, the overall impression is that the university/ college radio sector has work to do in reflecting the increasingly diverse opportunities emerging in the radio/ audio industry.

Skillset calculate that a significant percentage of the workforce in the radio sector come directly from school or college, via a range of routes.

At school and [FE level](#), the range of qualifications is varied, covering [A-levels](#), [BTEC](#), [Baccalaureates](#), [Diploma](#), [HND](#) and so on. On media-related courses, schools and colleges have been offering radio and audio production experience. However, this trend seems to be reversing, as institutions come under increasing pressure to maximise numbers and work with fewer resources. Anecdotally, courses with radio attached to them are closing due to falling numbers, and staff with radio experience are leaving the profession.

The change in curriculum to the Creative Media Production qualification illustrates the various factors involved. The Government has introduced a new framework with a benchmark for broad skills standards that are required by all courses. This has resulted in more generic courses, and reduced the number of smaller, specialist areas.

At the same time, the education sector is being encouraged to explore convergent media production skills, which would widen freelance working opportunities.

For example, the Diploma offered by Pearson covering [specialist production skills](#), e.g. radio or video games, only number a few hundred learners, whereas the broader [Digital Media Production course](#) has over 2,500 learners. The audio component of this course provides a starting point for students for a broad range of careers, including sound design in TV and film, and performing arts as well as radio.

The current expectation of Government is that BTEC learners reaching [level 4](#) will go into Higher Education ([HE](#)), but that might change in future years, e.g. with the introduction of the T-level qualification in 2022, which will be focussed more on technical and vocational skills, and therefore entry into the workplace.

[Creative and Cultural Skills](#) and the [National Skills Academy Network](#) provide advice and guidance, promoting apprenticeships for school leavers, and deliver courses through the [Apprenticeship Training Agency](#). In England, the flagship offer is the [Creative Employment Programme](#). However, of the 1000s of work-based opportunities, none appears to include radio production as a discipline.

The [Advanced Apprenticeship in Creative and Digital Media \(level 3\)](#) in England (slight variations apply in Scotland and Wales), provides a route into undergraduate courses, covering a range of skills including radio and audio.

Alongside this picture, there is increasing evidence of young people coming into the radio/ audio workplace by different routes. This is illustrated by two examples: engagement by hyperlocal and community stations and schemes offered by bigger brands, such as Bauer.

In the course of this research, it became clear that grassroots stations such as RADAR Radio, Repräsent, Roundhouse Radio and NTS offer training opportunities for local people.

The exact style and method of delivery varies. NTS, as an [NPO](#) provider of Arts Council, England, offer a rolling programme for eight 18–30 year olds each year, introducing them to various aspects of music and radio, including DJ skills, technical and legal work.

RADAR host week-long workshops, aimed at BAME applicants, that cover presenting, DJ skills, studio operation etc. They also work in conjunction with brands, such as a workshop on editorial journalism, in partnership with Dazed. Often, the workshops are run by talent and volunteers on the station.

Both RADAR and NTS pride themselves on giving full access to participants, so they can practice in studios at evenings and weekends. The model is designed to make strong connections with the audience, and provide a way of sourcing the next generation of station volunteers and ultimately staff or presenters.

Ben Fairclough, Station Manager at RADAR: “The workshops get so much love”. He cites the workshops run by Shy (Breakfast Show presenter), who worked with 12 young people, who are now regular listeners and contributors and who still send in their demos. The station has become part of their story and experience (see [case studies section](#) for similar operations run by Roundhouse Radio and Reprzent).

A more formalised route is offered by the Bauer Academy. This is part of Bauer Media, which owns and operates content across a range of platforms, including TV, print and 36 radio stations across the UK.

The academy offers a range of courses, some funded by private clients with [CSR](#) money, and others run by Government grants, such as the [adult education budget](#) and the [European Social Fund](#).

This latter project has funded a year-long, £1.8m programme called [Making Creativity Work](#) in London, working with 999 participants (47% of whom are 19–24 year olds).

The academy devised four courses: Ideas and Innovation (most popular option); radio (second most popular); Creative Writing; Employability. Each course lasted two weeks, full time.

The original intention of the Radio course was to work on traditional aspects of radio production for a music station, but the learners were more interested in podcasting skills. “Listening to someone play a tune is not that exciting” (Simon Long, Head of Training).

The curriculum was overhauled and instead focussed on recording, editing and producing material designed for podcast use.

For the young participants, podcasting equated to radio, not an FM station. “Here’s how to use audio, here’s the power of audio, here’s the tools – go off and create it.” (Simon Long).

The material produced covered a wide range of subjects, such as mental health issues, world events, local politics and community, celebrity and social consciousness.

Bauer have also pioneered the Accelerator Programme, where companies can use their apprenticeship levy to provide upskilling for current employees. One such course is called Storytelling, and involves content production skills (audio, video, social media), designed to help companies tell the stories that relate to their core clients.

1.4 Conclusions

1. Young people are listening to less live radio each week than their peers, a trend that shows no sign of changing;
2. Live radio is still the preferred method, over 'listen again';
3. Smartphones account for 30% of audio listening for young people, but data charges and restrictions make listening to live radio unattractive;
4. The trend towards 'lean forward', modular listening (e.g. podcasts) is significant in terms of share of audience, though not necessarily the amount of time spent each week;
5. Ownership of voice-activated devices is beginning to have an impact on radio listening;
6. Traditional radio institutions are aware of the challenges they face in encouraging young people to listen to the radio in the same way previous generations did;
7. Competition for young listeners' time and attention, in terms of social media and digital entertainment, is one focus;
8. The change in consumption habits can be defined by new characteristics for key groups of listeners, whose choice of listening reflects a wide and diverse range of influences;
9. There's an emerging strand of hyperlocal, small stations (and digital platforms) which are increasingly tapping into this kind of audience such as RADAR, NTS and Rinse;
10. Routes into radio and audio production continue to diversify;
11. Teaching audio skills as part of general media production has superseded traditional radio production in many schools and colleges;
12. Universities still offer a route based on participating in traditional format radio stations, though this doesn't always offer equal opportunity in terms of geography, gender, ethnicity and (dis)ability;

13. Small, local stations based in communities are offering workshops and training opportunities to engage with their listeners and generate new volunteers;
14. Media organisations are also diversifying into skills-based training, harnessing technology to work on different platforms and enable engagement with audio in general.

2.0 Case Studies

2.1 Direction Radio

Broadcast Platforms:

Web: <http://www.direction-radio.com/>

App: Online via iTunes Radio; tunein; vtuner

Background

The station is run by Surrey Choices, a trading authority under Surrey County Council, providing services and social support to people with special needs and a range of different abilities. It broadcasts from a Surrey Choices day centre, The Larches, in Epsom, Surrey, and was launched in July 2015, by the current station manager Chris Fenn. The station's activities run separately from the day centre, with the majority of the customers - the name given to those participating in the station in any capacity - coming from referrals, e.g. from the employability department of Surrey Choices. The key aim is to offer skills in to support in radio broadcasting, encourage participation and build confidence.

Operation

The station currently works with 18 customers (17 male, one female). The cost is £15 per hour, either self-funded or using the adult social care package. The majority are in their 20s, but there are some in their 40s. Some travel considerable distances to get involved, up to 30-40 miles. Very few have encountered radio production or radio making before joining the station, and come via recommendation and outreach. The station offers a programme of basic skills training for customers, which is equivalent to level 1 GCSE or NVQ. There are short visual tasks to complete, all linked to the equipment and resources in the studio. Depending on the level of need, this might take up to six months to complete. The completed portfolio is verified by an adjudicator, and can provide a stepping stone into another qualification, at college level.

However, many customers are content with the experience, without any qualifications. Everyone comes with a different remit, and the station is led by what the customers want.

“I always say....I give them a blank canvas, you do what you want to do with it.That gives the station its uniqueness...” (Chris Fenn, station manager).

The station has two studios, one for live output, the other for pre-records. The schedule is built around 14/ 15 hours of programmes per day (some live, some pre-recorded), and the remainder of the output is automated playout.

The schedule is varied and is determined by the customers. For example, there is currently a weekly show consisting of vinyl records chosen by a customer from his own collection. They might be selected from a theme or genre, and they are carefully scheduled in a two-hour mix, with meticulous research notes. The customer operates and plays out the show, but due to a vocal disability, does not appear on air as the presenter. Also, outside of the station, this customer doesn't interact with any other services, so this radio activity is their primary social support.

Another customer presents a speech show each week, based on a chosen topic (e.g. the London Underground). Another customer presents a film review show, while another popular format is a request show.

The station team recognise that while the primary focus is on differing abilities, other aspects of diversity are not so well represented, especially in terms of gender and ethnicity. There is not much turnover of customers, though they are always keen to take on new people. One former customer is now employed by the station in a part time role (one of two assistant station managers), so there is a path of progression available.

Audience and wider community

The online listenership is monitored via Syndacast. Listeners are spread across the world, including Canada and Australia. They can also track downloads of specific shows on Mixcloud. The audience picture seems to vary considerably, but there's an average of 1,000 listeners a day.

The station also engages in outreach activities. They regularly hold outside broadcasts at Sutton Common Rovers FC and at London Fire Brigade stations. They do special events, e.g. for Children In Need, and front discos and parties at other Surrey Choices centres. They also hold twice yearly gatherings for their customers, and their parents/ carers, which are a very important way of networking and creating social connection.

“It's like a massive happy family when we're all together” (Chris Fenn).

There are also relationships with radio industry people, such as Pete Waterman, and radio presenters and engineers. They also have support from record labels when needed.

Achievements

The station manager believes the core contribution the station makes is building confidence in their customers. Participating in radio breaks down isolation, and encourages social interaction and self-expression. Many of their customers had no social contacts before they became involved in the station. By joining Direction Radio, they build confidence, and start to engage with other people. The team at Surrey Choices attribute this to the buzz that radio has, its immediacy and simplicity. There also remains a prestige about it; customers like telling their friends and family they have a show on a radio station.

In the future, Chris is keen to continue building partnerships with other organisations, and explore the possibility of a DAB licence, if appropriate sources of funding can be found.

2.2 Rerezent

Broadcast Platforms:

Web: <http://www.rerezent.org.uk/>

107.3FM; DAB; App; Online

Background

Rerezent began as part of another radio project in 2008, a four-week broadcast off-shoot of Choice FM, in response to an upsurge in knife crime. It then became an Internet project, and made several applications for an FM licence, before going on air on 2011, when the current station manager, Adrian Newman, joined. Adrian describes the ethos as “We used to be like youth club radio, now we follow young people”. Rerezent is designed to be a credible platform where young people can air their opinions, talk to one another, play the music they like and give exposure to artists that wouldn’t get airtime on traditional communication channels.

Operation

The station broadcasts from the ‘pop-up’ box park in Brixton and currently offers 95 shows a week, featuring 70 guests a week. The station has a staff of seven (some part-time), plus a station director, brand manager and learning co-ordinator and works with 140 volunteers. The station also offers a rolling training programme, working with 15 young people at a time, over a ten-week period. There is a basic arts award attached, but since the paid staff do not have the resources to work towards a validated curriculum, there’s no opportunity for anything beyond this.

Funding for the station comes from mixed revenue sources, including sponsorship, brand opportunities, some advertising and one-off grants (e.g. an IT project funded by Southwark Council). In previous years the station operated purely on grants, but these opportunities have disappeared due to a culture of cuts in young peoples’ work. Adrian argues that brands like Greene King and Nike are dominant in the youth market, and being able to associate with a radio station adds credibility. Radio adds more to a brand presence than television or video.

However there is a risk that being too closely allied to the ‘brand dollar’ negates other responsibilities. Rerezent are very proud of working across three key broadcast channels – FM, DAB and online. They argue that this gives them more legitimacy than some of the other stations in their field, such as RADAR and NTS,

who do not have OFCOM licences for FM, even at the expense of being subject to regulation. Adrian sees it as a way of reaching out to people while protecting them from offensive language and political views.

Volunteers come to the station via the website, word of mouth and social connections. Having completed a 20-hour training programme, they can then work on the station, in various capacities. There is a strict culture of attendance: if a volunteer lets them down, they are removed from the list. Most volunteers range between 18-25 years (safeguarding issues make it harder to work with under 18s), and there's roughly a 50:50 gender split. Ethnically, the station is broadly representative of the London population. It originally had an identity as a black station (based on the earlier connection with Choice), but is now seen as more mixed and urban.

The schedule also reflects this, covering many styles of music including grime, hip-hop, dancehall, electronic, jazz, metal and house. There are also several speech shows on the station, which can cause issues over compliance, but are generally worth the extra resources needed. Recent examples include documentaries about knife crime and music, a takeover weekend by the band Gorillaz which generated hours of speech programmes, a magazine show for young women of colour, and presenter Amber discussing mental health issues.

Audience and wider community

The station doesn't have accurate listening figures for FM or DAB, since they don't participate in RAJAR. Anecdotally, they believe listening is hyperlocalised, and depends on a range of factors, such as ethnicity, gender, sexuality, location. Adrian believes engagement is more important than numbers, and for Rerezent, engagement is high. He's also wary of over-extending on too many platforms, since they're constantly changing. For example, the craze for Vine and Snapchat has now given way to Instagram Stories.

Achievements

Alumni from Rerezent have flourished in the radio and music industries, including Jam Supa Nova, Mim Shake, Kelly All Star, Reece Parker and Shy. "The BBC see us as their feeder project....we take people from youth to adulthood, that's our job" (Adrian Newman). Adrian argues that their training and discipline is highly regarded and recognised as a preparation for future careers.

Reprezent relies on financial security and the scalability of projects to continue their work. The station wants to have greater presence at festivals in 2018, and is working on a plan to launch a record label. Another goal is to franchise the station model to other locations and perhaps launch some satellite studios in other cities.

However, there is a note of caution. Assets for young people have been systematically stripped and partnerships are not viable. Sustainable projects require long-term investment: “The world of fundraising is exhausting” (Adrian Newman).

2.3 Roundhouse Radio

Broadcast Platforms:

Web: <http://www.roundhouse.org.uk/roundhouse-radio>

Online; App (radioplayer; tunein); ADS-RSL (venue licence)

Background

Roundhouse Radio started out as the radio component of a digital project for 11-25s, making their own shows. There was an application for an RSL licence in 2007, to provide a station for the project's content to go on. The next version was a podcast platform, without any station identity. This morphed into a more traditional radio schedule, and is now characterised once more as an audio platform, focussing on specialist shows, speech, podcasts, dramas and documentaries.

Operation

The current station manager Niccy Logan has been there two and half years, and is the only full-time member of staff. There are four broadcast assistants who work on shifts, a part time trainee manager and 46 regular volunteers. The station is funded out of the general Roundhouse Trust budget, which is a mixed revenue stream of Arts Council funding, private sponsorship, corporate donations and partnerships.

Roundhouse Radio reflects the exciting changes in the radio and audio industries at the moment, and will shortly re-brand the platform as 'Transmission Roundhouse', to focus more on media and lifestyle and young people and less on the traditional radio schedule. Initially, content will still be audio (live streamed and downloadable) but it is hoped to diversify into video in the future.

Niccy believes audio and sound are having a renaissance at the moment, as a medium and an art form. Previously, the career aspiration was to work for the BBC, perhaps on Radio 4 for speech or a breakfast show for music. Now the Internet has opened up peoples' imaginations and encouraged them to play with sound.

This approach is integral to the training programme at the Roundhouse. All courses are open access, pitched at varying levels for beginners, intermediate and advanced. Much of this involves working on digital content, so the audio skills can be used for podcasts, or audio installations or sound design. There are also more traditional radio opportunities, to practice presenting and studio operation.

For 11-14s, there is a course in radio drama, and for 18-25s, more technical training based on studios and recording. The perception now is that a career in radio can mean a wide variety of pathways: "...[the volunteers are saying] I can do it all: freelance at an internet station, freelance at the BBC, work on docs or make arts installations" (Niccy Logan).

Roundhouse also hosts a **quarterly networking** event for radio stations in the same area, called Audio Club. This attracts grassroots members of stations like Hoxton Radio, RADAR, Rerezent, Shoreditch Radio, Netil Radio, Camden Community Radio. At these events, radio and audio enthusiasts make connections, share ideas and sometimes collaborate on projects. One outcome was Heartbreak Hotline, a DJ mix on mixcloud featuring audio uploaded on Whatsapp from random contributors who had experienced romantic trauma or relationship break-ups.

Roundhouse Radio works to promote equal representation, and the entire management committee is female. Technical and production roles are largely female dominated too. Within the presenters, the gender split is 50% female, 40% male and 10% non-binary. Approximately 30% of the volunteers are from BAME.

Most presenters are over 18, for safe-guarding reasons, and they are nurtured through a long pilot process. Open calls to apply for a show go out twice a year. From this, applicants come in for a meeting and chance to make a short pilot. Then they refine this, and work on a longer version, before finally being commissioned. It can take a year for the process. One key aim for the team is to ensure volunteers share the same progressive attitudes to people from different backgrounds, where minorities and marginalised people are welcome. "I want to create a really healthy radio environment" (Niccy Logan).

The current schedule of the station is an approximate ratio of 40% speech : 60% music. The speech content is particularly well received. Current examples include full radio dramas each year, plus various short form series. Talk shows have included Project Pleasure (a sex education show aimed at over 16s), Unstable (about mental health), 20-Nothings (approaches to finance and entrepreneurship) and The Treasury (an arts and culture show).

Audience and wider community

The audience demographic is approximately 18-25, but that's based more on data from social media channels. There are over 25,000 unique listeners from 125 countries. Shows that are re-broadcast on Mixcloud generate a very international listenership, from Canada and Australia, Japan, USA and Europe. There was an

electro show presented by a [South African](#), which had a loyal following in sub-Saharan Africa.

Roundhouse have worked on several short-term partnerships in the past, including with groups such as CALM and Cardboard Citizens. A current co-production involves working with Liberal Judaism in London, creating material out of two projects, Twilight People and Rainbow Pilgrims (both dealing with LGBTQI+ stories) for a documentary.

Achievements

Alumni from the station include presenters and DJs Goldierocks, Coco Cole and Frankie. Thirty Roundhouse presenters also work elsewhere in the industry.

2.4 Podium.Me

Broadcast Platforms:

Web: <http://podium.me/>

Soundcloud

Background

The inspiration for Podium came after the riots that affected parts of London in 2011. Co-founder Camilla Byk went to her neighbourhood in Clapham Junction, and spoke to some of the young people helping the clear up on the streets. Their helpfulness and public spiritedness ran contrary to the narrative she saw on mainstream news channels and she interviewed the young people using her mobile phone, to gather their stories and perspective. “The vibe was the youth of today have wrecked this town and I could see that this wasn’t actually the story....this haunted me all summer. Where could I have heard this on an audio platform?” (Camilla Byk, co-founder, Podium.Me).

Camilla set up a workshop at a sixth form college, where students discussed six topics, which she recorded. The next stage was asking the participants to set their own agenda. Universities became interested in this model, and the age range was increased to include under-25s, especially since youthful experiences seem to extend into early adulthood. The BBC heard some of the stories, and these inspired commissions for programmes such as the Listening Project, Radio One and World Service documentaries.

Operation

Podium operates without any agenda. There are around 50 journalists (the name given to the contributors or volunteers) working at any one time, out of a database of over 350. They are a self-selected group, from schools, colleges, universities or post-graduates. They approach Podium individually, not via any organisation. Camilla speaks to them by phone and then puts them in contact with other local journalists, so there are networks or hubs supporting each other. Many alumni from Podium have gone on to have careers in radio, and come back to help as mentors.

Each journalist contributes their own ideas for a story, and they are given advice, feedback and guidance on how to make this and who to record. Sometimes the audio needs re-recording, and usually requires editing. Then it is put online as a podcast. Sometimes it develops further into additional podcasts. Strong and topical stories then form the basis of a pitch to commissioning editors and may be turned into radio programmes.

There is no template for this model, though there is a website, [News Decoder](#), which works on a similar basis for text-based stories, on a global scale. The main focus for Podium is to find and tell stories that won't be heard on mainstream media.

"We break the stereotype of the Oxbridge journalist that never goes anywhere outside the south east...[we are] totally meritocratic." (Camilla Byk, Podium.Me)

Since ideas are the main currency, the skills required are kept to a minimum. Journalists can use whatever equipment they have to hand (usually a mobile phone, with a voice recorder app). Some invest in a professional recorder, such as a Zoom or H1. Editing is done using whatever software is available or free to download.

Podium organise an annual training day, but this is less about skills and more about themes associated with generating good content and nurturing confidence. A recent training day in London (February 2018) had 'vulnerability' as the theme. The sessions (led by radio and audio professionals, commissioning editors, producers) focussed on how audio relies on gaining trust, which puts the contributor and journalist in positions of vulnerability. Students are using audio to open themselves up, to enable affecting conversations.

Many of Podium's journalists do not come through traditional routes into audio, as they may have personal issues. There are a number with autism and Asperger's Syndrome, for instance. Working with audio provides an opportunity to lose any previous labels or pre-conceptions about themselves.

Podium is financed through a range of revenue streams, such as Arts Council grants and the income from commissions. Overheads are kept to a minimum so it is a very lean operation. The journalists are all volunteers, but they do earn money if a commission is sold. There have been conversations around advertising and sponsorship, but Camilla is reluctant to dilute the proposition and yield to any other agenda. Previously the podcasts have been broadcast via audioBoom and ACAST but didn't generate any income. They currently used Soundcloud, at no cost.

The current way the podcasts are arranged, in a random order, tends to create serendipity, which generates more interest and engagement. Camilla argues that this is sometimes lost in the current culture of newsfeeds and algorithms.

The journalists reflect a broad range of regional interests. There is a map of the UK kept in Camilla's office with small dots representing their journalists. She is able to push for recruits where they need to fill gaps, e.g. during the Scottish Independence Referendum, and always tries to counter the London-bias, such as holding training days in Salford.

The range of subjects is determined solely by the journalists. Stories and topics that are current at the moment include male grooming, body image anxieties, refugees and immigrants and soundscapes in binaural sound. Often Podium picks up on issues before the rest of the media. One journalist moved to Germany and discovered refugees in her small town, and recorded this for a podcast. Similar stories about Syrian migrants have been picked up by the World Service.

There are off-shoot projects too, one involving music and another using drama, but these do not always have momentum or resources to produce as much material as the main podcasts.

Audience and wider community

The audience for Podium is global, with listeners in the UK, Europe, Australia and a big response from the USA. Most listeners use podcasting apps, and social media helps to promote new material. Podium's ethos is for young people to provide audio for adults to listen to in the first instance, so it's 'peer-to-adult' rather than 'peer-to-peer'. The next iteration happens when items are commissioned for stations like Radio 1, so then young people are the audience again.

The challenge is "How do we create high quality journalism by the masses, for the masses going forward?" (Camilla Byk). The belief is that audio is compelling, and the short form of the podcast (a three minute, 'bus stop' listen) is the right length to capture the attention. Elements of visualised content may be used in the future, especially since the podcast market is currently saturated.

Podium will continue to innovate and change perceptions, and challenge the business model, so that journalism is a respected career that is also one that is financially rewarding.

Glossary

AM/ FM	The most common bandwidths of terrestrial radio broadcasting, both in the UK and worldwide. FM uses VHF frequencies making for better sound quality than AM (which use longwave and shortwave frequencies).
A-levels	The A Level (Advanced Level) is a subject-based qualification conferred as part of the General Certificate of Education, as well as a school leaving qualification offered by the educational bodies in the United Kingdom and the educational authorities of British Crown dependencies to students completing secondary or pre-university education. A number of countries, including Singapore, Kenya, Mauritius and Zimbabwe have developed qualifications with the same name as and a similar format to the British A Levels. Obtaining A-Level or equivalent qualifications is generally required for university entrance, with universities granting conditional offers based on grades achieved.
Analogue	Relating to or using signals or information represented by a continuously variable physical quantity such as spatial position, voltage, etc, as opposed to digital.
Baccalaureate	An alternative to AS and A-Levels.
BAME	Black, Asian, and Minority Ethnic (used to refer to members of non-white communities in the UK).
BTEC	The BTEC (Business and Technology Education Council) Level 3 Extended Diploma is a Further Education qualification and vocational qualification taken in England, Wales and Northern Ireland. The qualification is organised and awarded by the Edexcel within the BTEC brand and it is equivalent to A-Levels. BTECs at levels 1 and 2 are equivalent to GCSEs, level 3 to A-Levels, and levels 4 -7 hold the same status of achievement as a degree.
CSR	Movement aimed at encouraging companies to be more aware of the impact of their business on the rest of society, including their own stakeholders and the environment, Corporate social responsibility (CSR) is a business approach that contributes to sustainable development by delivering economic, social and environmental benefits for all stakeholders.

DAB/ DAB+

Digital audio broadcasting (DAB) is a digital radio standard for broadcasting digital audio radio services, used in countries across Europe, the Middle East and Asia Pacific. DAB is more efficient in its use of spectrum than analogue FM radio, and thus may offer more radio services for the same given bandwidth. DAB is more robust with regard to noise and multipath fading for mobile listening, since DAB reception quality first degrades rapidly when the signal strength falls below a critical threshold, whereas FM reception quality degrades slowly with the decreasing signal. The original version of DAB used the MP2 audio codec. An upgraded version of the system was released in February 2007, called DAB+, which uses the HE-AAC v2 audio codec.

Diploma

A certificate awarded by an educational establishment to show that someone has successfully completed a course of study.

FE level

Further Education (often abbreviated FE) in the United Kingdom and Ireland is education in addition to that received at secondary school, that is distinct from the higher education (HE) offered in universities and other academic institutions. It may be at any level in compulsory secondary education, from entry to higher level qualifications such as awards, certificates, diplomas and other vocational, competency-based qualifications (including those previously known as NVQ/SVQs) through awarding organisations including City and Guilds, Edexcel (BTEC) and OCR. FE colleges may also offer HE qualifications such as HNC, HND, Foundation Degree or PGCE. The colleges are also a large provider of apprenticeships, where most of the training takes place in the apprentices' workplace with some day release into college.

HND

A Higher National Diploma (HND) is a work-related course provided by higher and further education colleges in the UK. A full-time HND takes two years to complete, or three to four years part-time. Generally, an HND is the equivalent to two years at university.

Hyperlocal

Relating to or focusing on matters concerning a small community or geographical area.

NPO

National Portfolio Organisations - an Arts Council term for organisations in receipt of regular Arts Council funding - currently for a period of three years. They represent some of the best arts practice in the world. For the funding period 2015-18, there are 663 organisations in its National Portfolio. It will have invested just under £1 billion in these organisations between April 2015 and March 2018.

OFCOM

The UK government-approved regulatory and competition authority for the broadcasting, telecommunications and postal industries of the United Kingdom. Ofcom has wide-ranging powers across the television, radio, telecoms and postal sectors. It has a statutory duty to represent the interests of citizens and consumers by promoting competition and protecting the public from harmful or offensive material.

RAJAR

Radio Joint Audience Research Limited was established in 1992 to operate a single audience measurement system for the radio industry in the United Kingdom. RAJAR is jointly owned by the BBC and the RadioCentre. It collects information on behalf of over 300 BBC and Ofcom Licensed commercial radio stations, ranging from very small local services to the national networks. Station listening by time, duration, platform (AM/FM, DAB, Online/APP, and DTV) and location (in car, at home, at work, or elsewhere) is recorded and published on a quarterly basis.

**voice activated
speakers**

Also called 'smart speakers', these are Internet-connected speakers controlled by the human voice, with an artificial-intelligence (AI) assistant responding to the owner's requests. This technology is sparking the next wave of audio consumption, fuelling further growth in digital and online audio.

Annexes

i. Contacts Data Base

Radio stations

The following details have been harvested in the course of this research project. Contact details are publicly available from the organisations' websites, and reproduced here for the benefit of British Council staff/ research only.

Direction Radio (Epsom, Surrey)	<p>The station is run by Surrey Choices, a trading authority under Surrey County Council, providing services and social support to people with special needs and a range of different abilities. The key aim is to offer skills in support of radio broadcasting, encourage participation and build confidence.</p>	<p>http://www.direction-radio.com/ info@surreychoices.com 01483 806806 Station manager: Chris Fenn</p>
Podium.Me (London)	<p>The main focus for Podium is to find and tell stories that won't be heard on mainstream media.</p> <p>It comprises a team of young journalists using their smartphones to record the stories and opinions of the under 25s from around the world. Individuals can pitch their podcast ideas, whether it's news, sport, music or simply a friend with something to say.</p>	<p>http://podium.me/ Camilla.byk@podium.me Key contact: Camilla Byk</p>
Reprezent (Brixton, London)	<p>Broadcasting across London since 2011, Reprezent 107.3 FM is designed to be a credible platform where young people can air their opinions, talk to one another, play the music they like and give exposure to artists that wouldn't get airtime on traditional communication channels.</p> <p>DJs and presenters work in the music industry, run their own clubs nights and produce their own music. Its premium training, collaborations and experiences drive youth culture and it continues to campaign on a range of issues affecting young people</p>	<p>http://www.reprezent.org.uk/ info@reprezent.org.uk Bussey Building, Unit C3, 133 Copeland Rd, London SE15 3SN Radio Office: 020 7639 8512 Station Manager: Adrian Newman</p>

Roundhouse Radio (Camden, London)	<p>Roundhouse Radio is a proving ground for a new generation of radio talent, all aged 11-25; an audio platform, focussing on specialist shows, speech, podcasts, dramas and documentaries. It runs open access courses for beginners through to advanced, centering around digital content.</p>	<p>http://www.roundhouse.org.uk/roundhouse-radio</p> <p>Contact via: http://help.roundhouse.org.uk/customer/portal/emails/new</p> <p>Station manager: Niccy Logan</p>
Soho Radio (London)	<p>Soho Radio is an online radio station broadcasting from the heart of London. Inspired by Soho's vibrant and diverse culture, Soho Radio brings together musicians, artists, film makers, chefs, poets and the generally curious, from across the globe.</p>	<p>http://www.sohoradiolondon.com</p>
VCS Radio Cardiff (Cardiff, Wales)	<p>Unique charity-owned, community-focussed broadcaster, offering a range of engaging volunteering opportunities to local people – providing training and support to help people improve their lives by becoming part of a thriving team, learning new skills and getting to put them into practice.</p>	<p>http://radiocardiff.org/ donna.zammit@radiocardiff.org</p> <p>VCS Cymru, Community Media, Studios, 5 Hayes Buildings, Curran Road, Cardiff, CF10 5DF</p> <p>029 2132 2627</p> <p>Head of Radio: Donna Zammit</p>
Radio Fáilte (Belfast, Northern Ireland)	<p>Raidió Fáilte is Belfast's only Irish radio station, broadcasting in the city on 107.1fm. It provides a community radio service to the Irish language community, helping to support and spread the Irish language in Belfast and around the world, and as such is a valuable platform for groups and individuals working in the Irish language sector to promote and showcase their activities. It also offers broadcast training.</p>	<p>http://www.raidiofailte.com/</p> <p>Contact via: http://www.raidiofailte.com/become-a-broadcaster/ - tabs-561-0-1</p>
Subcity Radio (Glasgow, Scotland)	<p>Subcity Radio is an independent, non-profit station, providing a platform to creative individuals to create forward-thinking radio content. Over 200 contributors make up its community, who are editorially independent, follow no set playlist, and whose content is entirely their own.</p>	<p>https://www.subcity.org/ manager@subcity.org</p> <p>John McIntyre Building, University Avenue, Glasgow, G12 8QQ</p> <p>Office: 0141 330 5438</p> <p>Studio: 0141 330 7033</p> <p>Station manager: Rose Manson</p>

Creative & Youth Opportunities

Creative & Cultural Skills	<p>Creative & Cultural Skills gives young people opportunities to work and learn in the creative industries. It is an independent charity that provides careers advice and guidance, promotes apprenticeships, and delivers activities for young people through our National Skills Academy network of industry and education supporters.</p>	<p>http://ccskills.org.uk/ info@ccskills.org.uk</p> <p>High House Production Park, Vellacott Close, Off Purfleet Bypass, Purfleet, Essex, RM19 1AS</p> <p>020 7015 1800</p>
Creative Skillset	<p>Creative Skillset works with the UK's screen-based creative industries to develop skills and talent, from classroom to boardroom.</p>	<p>https://creativeskillset.org/ info@creativeskillset.org</p> <p>94 Euston Street, London, NW1 2HA</p>
Bauer Academy	<p>A government registered training provider with the Skills Funding Agency and recognised as a Centre to deliver AIM Award qualifications, providing multimedia training at 22 sites across the UK. Its team of leading academics work alongside media professionals to design and deliver training programmes that make a remarkable difference to individuals, communities, and businesses. Its training is immersed inside one of the biggest media companies in the world, providing exciting and meaningful work based learning</p>	<p>http://baueracademy.co.uk/ hello@baueracademy.co.uk</p> <p>0131 475 1345</p> <p>Forth House, Forth Street, Edinburgh, EH1 3LE</p>
BBC Academy	<p>Training and development designed to support the BBC and the wider industry to inform, educate and entertain.</p>	<p>http://www.bbc.co.uk/academy/</p>
Global Academy	<p>Provides technical, business and creative skills training needed to work in the broadcast and digital media industry, and to help them connect their core studies with vocational skills in a practical and entrepreneurial way in an inspirational environment. Global are determined to help young people fulfil their potential and extend this opportunity to students from all backgrounds.</p>	<p>http://www.globalacademy.com/ question@globalacademy.com</p> <p>The Old Vinyl Factory, 1 Record Walk, Hayes, Middlesex, UB3 1DH</p> <p>0203 019 9000</p>
Community Media Association	<p>The CMA represents the community media sector to Government, industry and regulatory bodies, and its membership brings together established organisations, aspirant groups and individuals within the sector. It provides a range of advice, information and consultancy, offering support to anyone with an interest in the sector.</p>	<p>http://www.commedia.org.uk/ info@commedia.org.uk</p> <p>The Workstation, 15 Paternoster Row, Sheffield, S1 2BX</p> <p>0114 279 5219</p>

Student Radio Association	<p>The SRA is the volunteer-run representative body which supports and acts on behalf of the UK student radio community. It represents any radio station that is based at or linked to a place of education (such as a school, college or university), or that has students participating (including youth projects and stations that are run by local councils, communities or charities). Its purpose is to encourage and facilitate communication between student stations, to assist in their development, and to offer support and advice to new stations.</p>	<p>https://www.studentradio.org.uk/</p> <p>Contact via: https://www.studentradio.org.uk/contact/</p> <p>30 Leicester Square, London, WC2H 7LA</p>
Hospital Radio Association	<p>The national charity that supports and promotes Hospital Broadcasting in the UK, and consists of over 200 individual broadcasting stations. Almost all member stations are managed and staffed by volunteers; from presenters and producers, to ward visitors, children's ward play volunteers, administrators and charity trustees and management.</p>	<p>https://www.hbauk.com/</p> <p>Contact via: https://www.hbauk.com/contact</p> <p>0300 121 0500</p>
Media Trust	<p>A communications charity that believes in the power of media to change lives. It inspires the media and communications industry to share their time, knowledge and creativity to benefit charities, communities and young people. Working together, it amplifies charities' voices by developing their skills, creating compelling communications and connecting them with their audiences and beneficiaries.</p>	<p>https://mediatrust.org/</p> <p>info@mediatrust.org</p> <p>4th Floor, Block A, Centre House, 56 Wood Lane, London, W12 7SB</p> <p>020 7871 5600</p>
Big Music Project	<p>Dedicated to breaking barriers to the creative industries and making it easier to get a foot in the door, the BMP works with Music Hubs, Youth Music and Capital EXTRA's music potential to provide internships and work placements, and offer a programme dedicated to inspiring and empowering people, who are not in education, employment or training, to start their career in music.</p>	<p>http://www.thebigmusicproject.co.uk/</p> <p>Contact via: http://www.thebigmusicproject.co.uk/what-is-the-big-music-project/</p>
Youth Link Scotland	<p>YouthLink Scotland is the national agency for youth work, representing more than 100 youth work organisations across Scotland. It champions the role and value of the youth work sector, challenging government at national and local levels to invest in individuals' development.</p>	<p>https://www.youthlinkscotland.org/</p> <p>Contact via: https://www.youthlinkscotland.org/help-and-tools/contact-us/</p>

ii. Interviews

Interview	Date
Femi Adeyemi - CEO/ Creative Director, NTS	18.01.18
Ben Fairclough - Station Manager RADAR Radio	18.01.18
Camilla Byk - Podium.Me	23.01.18
Naomi Oiku - Chair, Student Radio Association	23.01.18
Matt Deegan - Creative Director, Folder Media	25.01.18
Toby Wynard - Sector Manager Creatives, Pearson	29.01.18
Simon Long - Head of Training, Bauer Academy	01.02.18
Adrian Newman - Station Manager, Reprerent	06.02.18
Niccy Logan - Station Manager, Roundhouse Radio	12.02.18
Chris Fenn - Station Manager, Direction Radio	15.02.18

iii. References

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[OFCOM: The Communications Market Report August 2017](#)

[RAJAR: MIDAS: Measurement of Internet Delivered Audio Services Winter 2017](#)

[Radiocentre; Global; Radioplayer: 'Getting Vocal: How voice-activated devices are increasing radio listening and elevating audio branding'](#)